

## CLAIMS

What is claimed is:

1. A configuration architecture comprising:  
  
a host instance comprising a host application server and a host database schema;  
  
a customer instance corresponding to a customer, wherein the customer instance  
  
comprises a corresponding customer application server and a  
  
corresponding customer database schema;  
  
a remote configuration engine for the host instance to receive host-defined data  
  
from a content factory, wherein the host-defined data comprises host-  
  
defined content and associated host-defined metadata; and  
  
a customer configuration engine for the customer to configure the host-defined  
  
data and host-defined rules, wherein the host-defined rules are generated  
  
by a host-based rules engine.
2. The configuration architecture of claim 1, further comprises the host-based rules  
engine to generate the host-defined rules.
3. The configuration architecture of claim 1, further comprises a customer-based  
rules engine to generate customer-defined rules.
4. The configuration architecture of claim 1, wherein the host database schema  
comprises the following: host customer repository and host-defined data  
repository.

5. The configuration architecture of claim 4, wherein the host customer repository comprises a customer profile corresponding to the customer, wherein the customer profile comprises customer-related information provided by the customer.
6. The configuration architecture of claim 4, wherein the host-defined data repository comprises the following: host-defined shared content repository and host host-defined metadata repository.
7. The configuration architecture of claim 6, wherein the host-defined shared content repository comprises the host-defined content.
8. The configuration architecture of claim 7, wherein the host-defined content comprises host-defined document and host-defined process.
9. The configuration architecture of claim 8, wherein the host-defined document comprises host-related service-related material.
10. The configuration architecture of claim 8, wherein the host-defined process comprises the following: host-defined workflow model and host-defined project template.
11. The configuration architecture of claim 6, wherein the host host-defined metadata repository comprises the host-defined metadata.
12. The configuration architecture of claim 1, wherein the customer database schema comprises the following: customer user repository, customer host-defined metadata repository, and customer-defined data repository.

13. The configuration architecture of claim 12, wherein the customer user repository comprises a user profile corresponding to a user, wherein the user profile comprises user-related information provided by the user.
14. The configuration architecture of claim 11, wherein the customer host-defined metadata repository comprises host-defined metadata.
15. The configuration architecture of claim 12, wherein the customer-defined data repository comprises the following: customer-defined content repository and customer-defined metadata repository.
16. The configuration architecture of claim 15, wherein the customer-defined content repository comprises customer-defined content.
17. The configuration architecture of claim 16, wherein the customer-defined content comprises customer-defined document and customer-defined process.
18. The configuration architecture of claim 17, wherein the customer-defined document comprises customer-defined service-related material.
19. The configuration architecture of claim 17, wherein the customer-defined process comprises the following: customer-defined workflow model and customer-defined project template.
20. The configuration architecture of claim 15, wherein the customer-defined metadata repository comprises customer-defined metadata.
21. The configuration architecture of claim 1, wherein the customer may access the host-defined data, wherein the access may be limited by permission from the host.

22. The configuration architecture of claim 21, wherein accessing the host-defined data comprises:  
  
browsing the host-defined data;  
  
searching the host-defined data;  
  
viewing the host-defined data; and  
  
navigating the host-defined data.
23. The configuration architecture of claim 22, wherein the navigation of the host-defined data comprises:  
  
navigating the host-defined data by category, wherein the category comprises  
marketing category (primary) and marketing subcategory (secondary);  
  
navigating the host-defined data by project stage/cycle, wherein the project  
stage/cycle includes plan, do, renew;  
  
navigating the host-defined data by source, wherein the source comprise the host-defined data and the customer-defined data type; and  
  
navigating the host-defined data by content type, wherein the content type  
comprises the workflow model, project template, case study, wizard,  
checklist, and scorecard.
24. The configuration architecture of claim 1, wherein the host instance and the customer instance are physically integrated.
25. The configuration architecture of claim 1, wherein the host instance and the customer instance are physically segregated.

26. The configuration architecture of claim 1, wherein the remote configuration engine further comprising:  
  
a content factory export module for the content factory to export the host-defined content and the associated host-defined metadata, wherein the content factory generates the host-defined content and the associated host-defined metadata;  
  
a host-based import module for the host instance to import the host-defined content and the associated host-defined metadata, and is further to forward the host-defined content and the associated host-defined metadata to a host-based integration module; and  
  
the host-based integration module for the host instance to integrate the imported host-defined content with the host-defined content in the host shared content repository, and the imported host-defined metadata with the host-defined metadata in the host host-based metadata repository.
27. The configuration architecture of claim 26, wherein the remote configuration engine further comprising:  
  
a host-based export module for the host instance to export the host-defined metadata to the customer;  
  
a customer-based import module for the customer instance to import the host-defined metadata, and is further to forward the host-defined metadata to a customer-based integration module; and

the customer-based integration module for the customer instance to integrate the host-defined metadata with the host-defined metadata in the customer host-based metadata repository.

28. The configuration architecture of claim 27, wherein the content factory comprises a remote content formatting and editing tool.
29. The configuration architecture of claim 1, wherein the customer configuration engine further comprises:
  - a host-based export module for the host to export the host-defined data and the host-defined rules, wherein the host-defined data comprises the host-defined content and the host-defined metadata;
  - a customer-based import module for the customer to import the host-defined data and the host-defined rules, wherein the customer-based import module is further to forward the host-defined data and the host-defined rules to a customer-based integration module; and
  - the customer-based integration module for the customer to integrate the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules.
30. The configuration architecture of claim 29, wherein the integration comprising:
  - modifying the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules;



39. A configuration architecture comprising:
  - a host instance comprising a host application server and a host database schema;
  - a plurality of customer instances corresponding to a plurality of customers,
    - wherein each of the plurality of customer instances comprises a customer application server and a customer database schema;
  - a remote configuration engine for the host instance to receive host-defined data from a content factory, wherein the host-defined data comprises host-defined content and associated host-defined metadata; and
  - a customer configuration engine for the plurality of customers to configure the host-defined data and host-defined rules, wherein the host-defined rules are generated by a host-based rules engine.
40. The configuration architecture of claim 39, further comprises the host-based rules engine to generate the host-defined rules.
41. The configuration architecture of claim 39, further comprises a customer-based rules engine to generate customer-defined rules.
42. The configuration architecture of claim 39, wherein each of the plurality of customer instances comprises a plurality of user instances.
43. The configuration architecture of claim 39, wherein the plurality of customer instances and the plurality of user instances are physically integrated.
44. The configuration architecture of claim 39, wherein the plurality of customer instances and the plurality of user instances are physically segregated.



45. A configuration system comprising:
- a host instance comprising a host application server and a host database schema,
    - wherein the host database schema comprises host-defined data comprising host-defined content and associated host-defined metadata;
  - a customer instance corresponding to a customer, wherein the customer instance comprises a corresponding customer application server and a corresponding customer database schema comprising host-defined metadata and customer-defined data comprising customer-defined content and associated customer-defined metadata;
  - a host-based rules engine to generate host-defined rules;
  - a customer-based rules engine to generate customer-defined rules;
  - a remote configuration engine for the host instance to receive the host-defined data from a content factory; and
  - a customer configuration engine for the customer to configure the host-defined data and the host-defined rules.
46. The configuration system of claim 45, wherein the remote configuration engine further comprises:
- a content factory export module for the content factory to export the host-defined content and the associated host-defined metadata, wherein the content factory generates the host-defined content and the associated host-defined metadata;



- a host-based export module for the host instance to export the host-defined data and the host-defined rules;
- a customer-based import module for the customer to import the host-defined data and the host-defined rules, wherein the customer-based import module is further to forward the host-defined data and the host-defined rules to a customer-based integration module; and
- the customer-based integration module for the customer to integrate the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules.
49. The configuration system of claim 48, wherein the integration comprising:
- modifying the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules;
- substituting the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules; and
- reprogramming the host-defined data and the host-defined rules by the customer.
50. A remote configuration engine comprising:
- a content factory export module for a content factory to export host-defined content and associated host-defined metadata, wherein the content factory generates the host-defined content and the associated host-defined metadata;

- a host-based import module for a host instance to import the host-defined content and the associated host-defined metadata from the content factory, and is further to forward the host-defined content and the associated host-defined metadata to a host-based integration module; and
- the host-based integration module for the host instance to integrate the imported host-defined content with the host-defined content at the host instance, and the imported host-defined metadata with the host-defined metadata at the host instance.
51. The remote configuration engine of claim 50, further comprising:
- a host-based export module for the host instance to export the host-defined metadata to a customer instance corresponding to a customer;
- a customer-based import module for the customer instance to import the host-defined metadata, and is further to forward the host-defined metadata to a customer-based integration module; and
- the customer-based integration module for the customer instance to integrate the host-defined metadata with the host-defined metadata at the customer instance.
52. The remote configuration engine of claim 50, wherein the content factory comprises a remote content formatting and editing tool.

53. The remote configuration engine of claim 50, wherein the content factory comprises a remote content factory to generate and export content and associated metadata.
54. A customer configuration engine comprising:
- a host-based export module for a host instance to export host-defined data and host-defined rules to a customer instance corresponding to a customer, wherein the host-defined data comprises host-defined content and associated host-defined metadata;
  - a customer-based import module for the customer to import the host-defined data and the host-defined rules, wherein the customer-based import module is further to forward the host-defined data and the host-defined rules to a customer-based integration module; and
  - the customer-based integration module for the customer to integrate the host-defined data with customer-defined data, and the host-defined rules with customer-defined rules.
55. The customer configuration engine of claim 54, wherein the integration comprising:
- modifying the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules;
  - substituting the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules; and

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- reprogramming the host-defined data and the host-defined rules by the customer.
56. The customer configuration engine of claim 54, wherein the host-defined rules are generated by a host-based rules engine.
57. The customer configuration engine of claim 54, wherein the customer-defined rules are generated by a customer-based rules engine.
58. A method of remotely configuring host-defined data comprising:  
exporting host-defined data comprising host-defined content and associated host-defined metadata, wherein the host-defined data is generated by a remote content factory;  
importing the host-defined data from the content factory; and  
integrating the imported host-defined data with the host-define data at a host instance.
59. The method of claim 58, further comprising:  
exporting the host-defined metadata from the host instance to a customer instance corresponding to a customer;  
importing the host-defined metadata; and  
integrating the host-defined metadata with the host-defined metadata at the customer instance.
60. The method of claim 58, further comprising:  
exporting the host-defined metadata from the host instance to a plurality of customer instances corresponding to a plurality of customers;

importing the host-defined metadata; and

integrating the host-defined metadata with the host-defined metadata at each of  
the plurality of customer instances.

61. A method of configuring host-defined data and host-defined rules comprising:  
exporting the host-defined data and the host-defined rules from a host instance to  
a customer instance corresponding to a customer, wherein the host-defined  
data comprises host-defined content and associated host-defined metadata;  
importing the host-defined data and the host-defined rules from the host instance;  
and  
integrating the host-defined data with customer-defined data, and the host-defined  
rules with customer-defined rules, wherein the customer-defined data  
comprises customer-defined content and associated customer-defined  
metadata.
62. The method of claim 61, wherein the integration comprising:  
modifying the host-defined data with the customer-defined data, and the host-  
defined rules with the customer-defined rules;  
substituting the host-defined data with the customer-defined data, and the host-  
defined rules with the customer-defined rules; and  
reprogramming the host-defined data and the host-defined rules by the customer.
63. The method of claim 61, wherein the host-defined rules are generated by a host-  
based rules engine.





- defined rules with the customer-defined rules; and
- reprogramming the host-defined data and the host-defined rules by the customer.
69. The method of claim 67, wherein the host-defined rules are generated by a host-based rules engine.
70. The method of claim 67, wherein the customer-defined rules are generated by a customer-based rules engine.
71. A method of configuring host-defined document comprising:  
exporting the host-defined document from a host instance to a customer instance  
corresponding to a customer;  
importing the host-defined document from the host instance; and  
integrating the host-defined document with customer-defined document.
72. The method of claim 71, wherein the integration comprising:  
modifying the host-defined document with the customer-defined document;  
substituting the host-defined document with the customer-defined document; and  
reprogramming the host-defined document by the customer.
73. The method of claim 71, wherein the customer-defined document is generated by the customer.
74. A method of configuring host-defined metadata comprising:  
exporting the host-defined metadata from a host instance to a customer instance  
corresponding to a customer;  
importing the host-defined metadata from the host instance; and

integrating the host-defined metadata with customer-defined metadata.

75. The method of claim 74, wherein the integration comprising:  
 modifying the host-defined metadata with the customer-defined metadata;  
 substituting the host-defined metadata with the customer-defined metadata; and  
 reprogramming the host-defined metadata by the customer.
76. The method of claim 74, wherein the customer-defined metadata is generated by  
 the customer.
77. A method of configuring host-defined workflow model comprising:  
 exporting the host-defined workflow model from a host instance to a customer  
 instance corresponding to a customer, wherein the host-defined workflow  
 model comprises a set of host-defined tasks;  
 importing the host-defined workflow model from the host instance; and  
 integrating the host-defined workflow model with customer-defined workflow  
 model, wherein the customer-defined workflow model comprising a set of  
 customer-defined tasks.
78. The method of claim 77, wherein the integration comprising:  
 modifying the host-defined workflow model with the customer-defined workflow  
 model;  
 substituting the host-defined workflow model with the customer-defined  
 workflow model; and  
 reprogramming the host-defined workflow model by the customer.

79. The method of claim 77, wherein the set of customer-defined tasks is generated by the customer.
80. A method of configuring host-defined project template comprising:  
exporting the host-defined project template from a host instance to a customer instance corresponding to a customer, wherein the host-defined project template comprises a set of host-defined steps;  
importing the host-defined project template from the host instance; and  
integrating the host-defined project template with customer-defined project template, wherein the customer-defined project template comprising a set of customer-defined steps.
81. The method of claim 80, wherein the integration comprising:  
modifying the host-defined project template with the customer-defined project template;  
substituting the host-defined project template with the customer-defined project template; and  
reprogramming the host-defined project template by the customer.
82. The method of claim 81, wherein the set of customer-defined steps is generated by the customer.
83. A method of configuring host-defined rules comprising:  
exporting the host-defined rules from a host instance to a customer instance corresponding to a customer, wherein the host-defined rules are generated



a step for importing the host-defined metadata; and

a step for integrating the host-defined metadata with the host-defined metadata at the customer instance.

88. The method of claim 86, further comprising the steps of:

a step for exporting the host-defined metadata from the host instance to a plurality of customer instances corresponding to a plurality of customers;

a step for importing the host-defined metadata; and

a step for integrating the host-defined metadata with the host-defined metadata at each of the plurality of customer instances.

89. A machine-readable medium having stored thereon data representing sequences of instructions, the sequences of instructions which, when executed by a processor, cause the processor to:

export host-defined data comprising host-defined content and associated host-defined metadata, wherein the host-defined data is generated by a remote content factory;

import the host-defined data from the content factory; and

integrate the imported host-defined data with the host-defined data at a host instance.

90. The machine-readable medium of claim 89, wherein the sequences of instructions which, when executed by a processor, further cause the processor to:

export the host-defined metadata from the host instance to a customer instance

corresponding to a customer;

import the host-defined metadata; and

integrate the host-defined metadata with the host-defined metadata at the customer instance.

91. The machine-readable medium of claim 89, wherein the sequences of instructions which, when executed by a processor, further cause the processor to:

export the host-defined metadata from the host instance to a plurality of customer instances corresponding to a plurality of customers;

import the host-defined metadata; and

integrate the host-defined metadata with the host-defined metadata at each of the plurality of customer instances.

92. A method of configuring host-defined data and host-defined rules comprising the steps of:

a step for exporting the host-defined data and the host-defined rules from a host

instance to a customer instance corresponding to a customer, wherein the

host-defined data comprises host-defined content and associated host-defined metadata;

a step for importing the host-defined data and the host-defined rules from the host instance; and

a step for integrating the host-defined data with customer-defined data, and the host-defined rules with customer-defined rules, wherein the customer-defined data comprises customer-defined content and associated customer-defined metadata.

93. The method of claim 92, wherein the step for integration comprising the steps of:  
 a step for modifying the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules;  
 a step for substituting the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules; and  
 a step for reprogramming the host-defined data and the host-defined rules by the customer.
94. The method of claim 92, wherein the host-defined rules are generated by a host-based rules engine.
95. The method of claim 92, wherein the customer-defined rules are generated by a customer-based rules engine.
96. The method of claim 92, wherein the host-defined content comprises the following: host-defined document and host-defined process.
97. The method of claim 96, wherein the host-defined process comprises the following: host-defined workflow model and host-defined project template.

98. A machine-readable medium having stored thereon data representing sequences of instructions, the sequences of instructions which, when executed by a processor, cause the processor to:  
  
export the host-defined data and the host-defined rules from a host instance to a customer instance corresponding to a customer, wherein the host-defined data comprises host-defined content and associated host-defined metadata;  
  
import the host-defined data and the host-defined rules from the host instance; and  
  
integrate the host-defined data with customer-defined data, and the host-defined rules with customer-defined rules, wherein the customer-defined data comprises customer-defined content and associated customer-defined metadata.
99. The machine-readable medium of claim 98, wherein to integrate further causes the processor to:  
  
modify the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules;  
  
substitute the host-defined data with the customer-defined data, and the host-defined rules with the customer-defined rules; and  
  
reprogram the host-defined data and the host-defined rules by the customer.
100. The machine-readable medium of claim 98, wherein the host-defined rules are generated by a host-based rules engine.



101. The machine-readable medium of claim 98, wherein the customer-defined rules are generated by a customer-based rules engine.
102. The machine-readable medium of claim 98, wherein the host-defined content comprises the following: host-defined document and host-defined process.
103. The machine-readable medium of claim 98, wherein the host-defined process comprises the following: host-defined workflow model and host-defined project template.